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Making Live Music Count: The UK Live Music Census

In 2017 the authors of this paper conducted the first-ever nationwide live music census, allowing for an unprecedented level of detailed comparable data on the live music cultures of different localities. Live music censuses have been increasingly used in recent years (e.g. Melbourne, Austin, Edinburgh, Bristol) as a tool for illustrating the value of music to policymakers. This has also coincided with a challenging period for live music venues in urban areas, particularly small venues and clubs. We present key findings from the census here, reflecting on how local contexts both shape the census process and may be informed by it, and on the growing use of the idea of "Music Cities" to inform policy.

Keywords: live music, census, Music City, cultural value

Introduction

The UK's first national live music census took place in 2017. The UK Live Music Census involved a multipronged methodology, outlined here and discussed further in relation to specific findings. Snapshot censuses of live music activity across a twenty-four hour period on March 9, 2017 in three localities (Glasgow, Oxford, and Newcastle-Gateshead) were conducted by volunteers visiting venues to gather observational information and conduct surveys of audience members and venue staff. These were supplemented with online surveys – gathering quantitative and qualitative responses – of audiences, musicians, venues, and promoters which ran from March to June 2017, in those cities and also nationwide. As part of the project, partner organizations worked on "affiliate" censuses in other cities, the data from which fed into the information from the nationwide surveys and, finally, a series of "profile interviews" of venue operators and musicians provided further qualitative data.

The use of live music censuses as a tool for illustrating the value of music to policymakers has increased in recent years: for example, in Melbourne, Austin, Edinburgh, and Bristol (Music Victoria; Titan Music Group; Behr et al. *Edinburgh*; Bucks). A live music census is not, therefore, just an academic exercise. It has potential for impact on how policymakers – locally, nationally, and internationally – understand, value, and encourage live music in cities. In short, it has implications for notions of a "Music City." The intention of the UK Live Music Census (UKLMC) project was to help measure live music's social, cultural, and economic value, discover what challenges the sector is facing, and make suggestions for evidence-based policy. We also wished to produce a free, open source, toolkit for anyone wanting to run their own live music census. This article presents key findings from the census while considering some of the issues around combining a national and a local census in the context of notions of a "Music City." It then reflects on how local contexts both shape the census process and may be informed by it.

Context

Our idea to conduct a national live music census was the culmination of several prior research projects on the cultural value of live music funded by the UK's Arts and Humanities Research Council (AHRC). The first of these, in partnership with The Queen's Hall venue in Edinburgh (2013-14), examined cultural value and cultural policy through the lens of a specific venue playing host to multiple promotional practices. Next came a project in 2014 – "From Pub to Stadium: The Ecology of Public and Commercial Investment in British Live Music Venues" – with a wider geographical focus, examining a range of venue types across Glasgow, Leeds, and Camden (London). Both projects drew on the concept of an "ecology" of live music. This had been developed by the Live Music Exchange (LMX) team[1] to better understand the particular conditions in which live music happens in a particular place and time (Behr et al. "Live Concert").

The 2013-14 research on the cultural value of enthusiast, state-funded, and commercial live music yielded three key findings (Behr et al. *Cultural Value*). First, although audiences, artists, and promoters account differently for why they participate in live music, their explanations also share certain characteristics across genres. Secondly, venues are key to the value of the live music experience; audiences think not only about the music they are going to hear and see, but also about *where* the event is taking place. Factors such as intimacy, character, and uniqueness influence audience decisions about attendance. Thirdly, local authorities who investigate their local music ecology come to realize the interdependency of venues of different sizes and types. The fortunes of one venue may affect other venues in the region.

The second cultural value project yielded five additional findings (Behr et al. *Cultural Value*). First, the weakest point of the UK's live music ecology is currently small to medium independent venues. The research revealed that these categories of venue were most at risk from surrounding developments, licensing, and planning regulations, and that they encountered difficulties negotiating the different aspects of their local councils (13). Second, policymakers need to more closely heed the economic and cultural contribution of smaller venues. Local councils often focus on major developments whose key beneficiaries are larger businesses, while smaller operators have a harder time impacting on policymaking. The small venues that sometimes fold under pressure from development and property prices are sites of vital social interaction and launchpads for musical careers that feed the broader industry. Third, the need for a more “joined up” approach across council services is widely acknowledged but not always fully implemented. Culture departments, or those responsible for planning and regeneration, may be sympathetic to venues’ problems compared to licensing and environmental health, for instance (13). Fourth, greater harmonization, where possible, of regulatory regimes and their implementation across the UK could benefit independent and major live music operators alike since regulatory inconsistency across local jurisdictions can hamper planning and execution of touring activities. Achieving congruence across devolved regions and multiple local contexts would be difficult. Nevertheless, dialogue and agreement on guidance and principles would alleviate the challenges faced by live music practitioners in a sector that simultaneously depends on local context (venues, audiences, councils) and on touring musicians and promoters operating across these contexts. Finally, competition between cities drives investment in infrastructural projects, yet this reveals tensions between two closely aligned terms, “regeneration” and “gentrification.” In Glasgow, for instance, considerable public investment in the Hydro Arena project (including £15million from the city council) has altered the character of the surrounding locality, and aided the city’s international profile, although the benefits from the project to the city’s grassroots music are less clear (16-17). One of the side effects of regeneration is that it can cause difficulties for venues without the commercial or political resources to adapt quickly to the associated gentrification that occurs. It is these smaller spaces that provide both performance and social spaces for up-and-coming acts. They feed into an area's "local character" – its musical history – in a way that makes them difficult to replace (5).

Our research coincided with a challenging period for live music venues in urban areas, particularly small venues and clubs. In the UK, for instance, numerous media reports have described British music venues closing due to property development and gentrification in once lively musical neighborhoods—see, for examples, Harris; Pollock). Closures have resulted not only from the conversion or even demolition of some venues – for example, Sheffield's Bed/Music Factory or London's Astoria – but also development *around* venues and the ensuing noise complaints from venues' new residential neighbors – for example, Brighton's Bright Tiger Club.

As a result of the challenges facing music venues, and following the projects outlined above, the music industries[2] have responded in several ways, including drawing on academic research. Our partners on the second Cultural Value project included UK Music, established in 2008 as the key lobbying and representative organization for the British music industries, as well as membership and related organizations, notably the Musicians' Union. One example of academic work feeding into industry concerns can be found in the increased momentum around the "Agent of Change" principle (referred to in our *Cultural Value of Live Music* report as the "right of first occupancy"). The "Agent of Change" principle places the responsibility for managing the impact of a change to an area or business upon the person or business responsible for that change. "Agent of Change" should ensure that noise mitigation measures such as soundproofing are in place before any issues over noise can arise. This is a politically significant intervention since it involves the reorientation of planning strategies away from an economic focus towards a system that protects existing uses of buildings.

Our research (Behr et al. *Cultural Value*) highlighted the "Agent of Change" as a way to protect small music venues, and, shortly after publication, the Musicians' Union, for instance, lobbied policymakers to adopt it. They were joined by the Music Venue Trust, which was established in in 2014 to help improve, maintain, and organize music venues in the UK.[3]

By 2015 Edinburgh was the subject of various news reports voicing concern over recent venue closures (and threats of closure). In response the City of Edinburgh Council set up a working group – Music is Audible. LMX members who were on that group undertook a pilot census project to better understand what was happening in Edinburgh and to provide evidence to the Council of both the value of live music in the city and the challenges facing the sector. Based on a combination of data gathered on a census night (June 6, 2015) and online surveys, the Edinburgh Live Music Census revealed both the extent of live music in venues not previously covered by assessments of cultural activity and its value to the city. It also revealed specific issues facing Edinburgh's musicians and venues. For example, 48% of venues in the data collected by census takers reported having been affected by "noise, planning or development issues," 42% of respondents to the venue online survey reported currently experiencing issues relating to noise and 44% of musicians reported that their gigs had been affected by noise restrictions (Behr et al. *Edinburgh* 4). The city licensing board's "inaudibility clause" – stipulating that amplified music be "inaudible" in neighboring residential properties – frequently cropped up in the qualitative comments of the surveys, suggesting that it had a "chilling effect" on venues' preparedness to put on live music and the kind of music they might provide.

The Edinburgh Census report made three key policy recommendations: (1) to change the city Licensing Board's inaudibility criterion to reflect "nuisance" or decibel-level; (2) to encourage adoption of the "Agent of Change" principle and working towards its enactment by the Scottish Parliament; and (3) to ensure that the City Council's cultural policy recognized both the economic and cultural value of live music to the city. After extensive follow-up work by Adam Behr and Matt Brennan with the council and the Music Is Audible group, the licensing board voted in 2016 to relax its noise stipulations, replacing "inaudible" with "audible nuisance." Building on the success of the Edinburgh census, we sought funding for a broader, UK-wide, data-gathering exercise. The aim was to obtain a more robust assessment of the true picture of live music in the UK, and the relationship of smaller spaces for live music – including those whose primary business may not be music-related – to the overall musical ecology.

A further context was the development of notions of a "Music City." In 2015, the International Federation of the Phonographic Industry (IFPI) and MusicCanada published a report on "The Mastering of a Music City" (IFPI). This defines a "Music City" as "a place with a vibrant music economy" and offers a "roadmap" for how to tap into music's potential to deliver "significant economic, employment, cultural and social benefits" (IFPI 5). The idea of using music as a tool to make cities better has "been around for hundreds of years," according to Shain Shapiro, founder of Sound Diplomacy and a key advocate of the "Music Cities" concept. Richard Florida was espousing the concept of using the creative industries more generally as a tool for regeneration back in the 2000s in his work on creative classes noting, for instance, that, “it is the ability to attract human capital or talent that creates regional advantage” (*Cities* 50). However, concerns arose over the extent to which the regeneration of post-industrial neighborhoods overlapped with “gentrification” that hollowed out existing residents (and character) from those locales, with questionable outcomes for musical creators overall (see, for example, Lashua, Cohen, and Schofield). Indeed the concept was eventually rejected by Florida himself as the expected “trickle-down benefits” from so-called “talent clustering” failed to materialize (“More Losers”) and property prices increased in previously low-rent “creative” neighborhoods. This “gentrification” of previously lively neighborhoods is one of the reasons that live music venues in some cities are struggling, either as rents and business rates[4] increase or as new residential property is built nearby which can then lead to noise complaints from new residential neighbors. It would therefore be ironic indeed if an unintended consequence of the “Music Cities” movement is *further* gentrification and loss of music venues. To mitigate this, the “Music Cities” report acknowledges gentrification and its impact on music venues and contains some measures to try to protect music venues (IFPI 38-43), including the creation of so-called cultural districts and the “Agent of Change” principle.

Some local authorities in the UK are now starting to recognize the potential for music in particular to bring economic, social, and cultural benefits to their city and are making attempts to measure those benefits. For example, Brighton & Hove Council has commissioned the Brighton Music Office to write a report about live music and to develop recommendations for the city to help support the live music community. The Office’s managing director, Chelsea Rixson, believes that this is because,

> The council values live music; they see it as the "golden egg" and understand that if we don't look after it then it could disappear and that this would be a disaster for the city. One thing they want [is]… to show how people travelling into the city for live music spend money across a variety of different businesses whilst they are here and not just in live music; for example in restaurants, travel, shopping, hotels, etc. I think that as well as these economic benefits, though, the council are also interested in people's standard of living and quality of life … and that live music is a massive part of that in Brighton. (Rixson)

As this quotation illustrates – and as highlighted by our work in Edinburgh – there is an appetite for data from policymakers and local authorities as well as economic development groups, campaigners, and membership groups. Indeed, by the time we applied for funding for the national census project (in partnership with the Musicians' Union, Music Venue Trust, and UK Music) there had been several industry reports about the overarching economic contribution of the music industries at national level (e.g. Page and Carey; UK, *Measuring*). Nevertheless, there was still a comparative lack of specific data around current live music provision at the local level. In particular, there was little "hard data" to present to policymakers when making the case for the significance of the "grassroots" live music sector at a national level. We therefore aimed to address the knowledge gap about the specific relationship between the value of live music, on the one hand, and the current challenges facing venues across the UK on the other. The next section presents our findings as they relate to the economic, social, and cultural value of live music (and venues) and the challenges currently facing the sector.

The Economic Value of Live Music

There have been various efforts over the past decade to measure the economic value of the live music sector in the UK. Between 2008 and 2011, PRS for Music – the UK society which collects royalties for composers via licensing music usage – produced annual reports called *Adding Up the UK Music Industry*. Using a methodology that evolved over time, the reports suggested that revenue from the live music industry overtook that of the recording industry in 2008 (Page and Carey). This trend is not, of course, limited to the UK. A US Department of Commerce report from 2016 describes live music as "helping to offset losses in other areas of the music industry" (US Department of Commerce 1).

The next organization to take up the baton of valuing the music industries was UK Music. Recognizing the efficacy of generating "big numbers" to policymakers and the media, UK Music first forayed into research with *Destination Music*, a report into the contribution of music festivals and major concerts to tourism in the UK. Here UK Music commissioned Professor Adam Blake of Bournemouth University to aggregate 2009's ticket purchase data from national ticketing agencies and carry out an analysis on their behalf (Blake 4). This has now evolved into the annual *Wish You Were Here* reports, which generate "big numbers" about spending on live music attendance by local residents and "music tourists," on their direct and indirect spending on live music, and on the number of jobs sustained. In 2014 UK Music also started producing its own annual report, *Measuring Music*, on the value of the UK music industries as a whole.[5] Echoing PRS for Music's earlier work, UK Music's figures suggest that live music is now consistently the largest generator of revenue in the UK's music industries, in 2016 making up £1 billion of the £4.4 billion total gross value added (GVA) of the total music industries (*Measuring Music: 2017* 11). UK Music's research also presents data on economic value at a regional level, most notably in its *Wish You Were Here* reports, which offer snapshots of particular regions and/or cities although the snapshots of localities like Newcastle, Manchester and Brixton do not attempt to be comprehensive.

Economic Information in the Census Snapshot Cities

While hoping to provide granular data about localities in our UK Live Music Census we were also mindful of the simultaneous need to link local information to a bigger picture, and the fact that such "big numbers" are part of the process of informing the policymakers (and media) for whom they are a *lingua franca* (cf. O'Brien). To ensure that these figures were produced robustly, and in a replicable fashion, we worked with a statistician, Professor Jake Ansell, to develop a methodology for measuring the economic value of live music in our primary snapshot cities in terms of total consumer spending, GVA[6] and the number of full-time equivalent jobs (FTE) sustained by the sector. Initially we had hoped to base our figures on the data on income and expenditure derived from the online venue surveys. However, reluctance by venues and promoters to give such data, often due to time pressures and survey fatigue, appears to be a sector-wide issue and we judged that there was insufficient data on which to estimate GVA and FTEs. We decided that the data collected on audience spending and attendance figures on the snapshot census date provided more useful information for our purposes.

From a survey of audience members attending live music events on the census day we obtained information about the spending by respondents on seven expenditure items: local transport, food/drink at the venue, food/drink external to the venue,

merchandise, accommodation, ticket price, and other (unspecified) spending.
To produce an overall estimate of audience spending, the relevant data from the survey of audience members was combined with data from the online survey of venues about their average audience size on the snapshot census date, the average frequency of when venues were open during the week, and a ratio for seasonal behavior derived from the online venue survey for days of the week and for seasons compared to the snapshot census date, which was a Thursday in March. The full methodology for this ratio and the economic calculations below is available in detail in the full census report.[7] GVA and FTE were calculated from this estimate of audience spending based on the methodology and ratios generated by UK Music. While the census included online surveys of audiences, musicians, venues and promoters that ran nationwide for four months, finite resources meant that we focused our snapshot censuses on cities where members of the core research team were based. We discuss the logistics and ramifications of this below but it warrants mention here by way of explanation for the focus of the economic estimates.

Our estimates of economic value for the three key case-study cities were as follows:

- In Glasgow, the estimated total annual spend on live music is £78.8 million ($105.11m), equating to an equivalent estimated GVA of £36.5 million ($48.7m) and an estimated 2,450 FTE jobs. The estimated city population of Glasgow is 593,245 with a greater city region population of 1,804,000 (Office for National Statistics, *Population*).
- In Newcastle-Gateshead[8], the estimated total annual spend on live music is £43.6 million ($60.8m), equating to an equivalent estimated GVA of £19.9

million ($26.5m) and an estimated 1,620 FTE jobs. The estimated combined population of Newcastle and Gateshead is 480,400 (Office for National Statistics, *Population*).

- In Oxford, the estimated total annual spend on live music is £10.5 million ($14.0m), equating to an equivalent estimated GVA of £4.8 million ($6.4m) and an estimated 350 FTE jobs. The "usually resident" population of Oxford is 151,900 (Office for National Statistics, *2011 Census*).

Such economic figures can only ever be estimates, of course, because there is no single organization keeping an "accurate" tally of audience spending when expenditure on travel, food/drink, and accommodation is taken into account as well as ticket data. And as ex-CEO of UK Music Jo Dipple said in 2016, "With flaws in our national accounts, flaws acknowledged by Government and the EU Commission, [UK Music's] reports give the music sector a credible language to use in policy and legislative contexts" (*Wish You Were Here 2016* 12). As the development of our economic methodology highlighted, generating our own "big numbers" was a useful reminder that such figures are only ever as good as the data used to generate them and that the final estimate is dependent on the calculation used as well as whether means or medians are used as measures of central tendency or "averages." We did not attempt to provide an estimate of live music's economic value at a national level. Our research is not designed to replace the work of UK Music and others in ascertaining the economic value of the sector. Instead it is intended to sit alongside such reports in an attempt to provide a more holistic understanding of the value of live music in the UK, and to discuss this value together with the challenges facing the sector. Indeed, one of the aims of the project was to develop a methodology as part of the toolkit which could be used by *any* local census coordinator without recourse to other agencies for data.

Economic Value – Audience Surveys

In addition to measuring the economic value of live music at the local level in our primary snapshot cities, we wanted to explore other ways of measuring economic value as it pertained to stakeholders at a more granular level than that of the city, and to further explore the relationship between live and recorded music. To do so, we asked musicians and audiences about measures of economic value of live music as it relates to them personally. Thus the audience surveys asked respondents about how much they spend on average each month on tickets for live events and on recorded music. The census data suggests that outlay on tickets for live music events now forms a greater proportion of consumer spending on music than recorded music: 47% of respondents to the audience survey spend £20 on tickets for concerts/festivals each month while only 25% spend the same on recorded music. Perhaps unsurprisingly, there are generational differences in spending habits which suggests that while respondents to the audience survey aged over 65 years old spend the most on concert/festival tickets per month, those respondents aged 18-34 years old spend the most on gigs/clubs/small venue tickets. It appears that those respondents aged 35-64 years old spend more on recorded music than both these other groups.

Such findings add further weight to the argument put forward by Williamson and Cloonan that the "music industry" is not monolithic and consists of more than just the recording industry. As these numbers, and those generated by UK Music and others, have shown touring and the live sector now appear to be economically dominant within the wider music industries. This is in marked contrast to being the “shit on the shoe” of the music industry, as Live Nation’s UK CEO Paul Latham memorably described the live sector at a Live Music Exchange conference in 2013 (Live Music Exchange, “Simon Frith”).

Economic Value – Musician Survey

Another source of data about the economic value of live music was the online survey of musicians. This asked a number of questions about musicians’ earnings, annual income, and expenditures. A key part of the annual income of respondents to the survey of musicians derives from live performance rather than recording. This was the case both overall and even more markedly for those identifying as professional musicians.[9] For example, 49% of professional musicians’ annual income comes from performing compared to only 3% from recording, with teaching and other music-related activity also forming a substantial part of their annual income. For semi-professional musicians, 23% comes from performing and 2% from recording, with 58% of annual income from non-music-related activity and the remainder from teaching, sessions, composition, and other music-related activities. For amateur musicians responding to the survey, 6% of their direct annual income comes from performing and 1% from recording (Webster et al. *Valuing…Report* 20). As this suggests, musicians’ annual income may come from a variety of sources but live performance is of particular economic value. This aspect of the research was primarily focused on *relative* earning across musical activities, although some figures were provided for earnings from live music. 28% of respondents identifying as professional musicians earned up to £5,199 per annum, 22% earned between £5,200 and £10,399, 16% earned between £10,400 and £15,999, and 11%

earned between £15,600 and £20,799. 24% of professional musicians earned above £20,888 annually from live music, with only 3% placing themselves in the highest earning category of £52,000 and above (Webster el al. *Valuing…Executive Summary* 21). While there are, of course, other sources of income for musicians, the broader context for these figures is one in which musicians' earnings *overall* are below the national median. Research by the Musicians' Union in 2012 found that 56% of their respondents earned less than £20,000 per year, the national median at the time being £26,500 (Office for National Statistics, *Annual Survey … 2012*). The median for 2017, when the UK Live Music Census was carried out, was approximately £28,600 (Office for National Statistics, *Annual Survey … 2017*).

There are also other economic indicators. Distance travelled can be used as another measure of economic activity as it indicates a willingness to pay in time and effort, with financial ramifications for the both specific gigs and the musician in question. Our census data suggests that the median distance travelled each month to perform live music by those respondents to the musician survey who self-identify as professional is 300 miles. By semi-professionals it is 80 miles and by amateurs it is 20 miles.[10] We stated only median figures in our report but future censuses could perhaps translate these measures of distance into another "big number" using travel cost analysis.[11] Migration also provides a measure of value that can be thought of in economic terms. For example, one of the most striking findings of the UK Live Music Census is that 18% of all respondents to the musician survey moved to their current permanent place of residence specifically for more music opportunities. For professional musicians this figure rises to 31% (Webster et al. *Valuing…Report* 37). Overall, then, a live music census offers a variety of means of understanding economic value of live music, from micro to macro, and which can be analyzed at both local and national levels.

The Social and Cultural Value of Live Music

While previous work by UK Music (e.g. "Measuring Music") and others (e.g., Page and Carey) has focused on measuring the economic value of live music, it has concentrated less on social and cultural value. As music fans as well as academics, and given that our previous research had shown music's reach goes "beyond the numbers" to encompass cultural value, we felt it necessary to expand notions of value within the live music sector beyond the purely economic. Previous live music censuses, including our pilot study in Edinburgh, had not explicitly addressed the social and cultural value of live music, and we were therefore breaking new ground in terms of developing a methodology which could capture rich and useful data around these less tangible aspects of value. In this way we differ somewhat from Eleanora Belfiore and Oliver Bennett's assertion that "[i]t is not possible to make any meaningful broad generalization about how people respond to the arts, and if or how they might be affected by the experience" (126).[12]

Drawing on a number of other pieces of research into cultural participation, then, we chose a survey-based approach which captured both quantitative and qualitative data on cultural value from all four key stakeholders (audiences, musicians, promoters, and venues). For example, both the online and snapshot census date audience surveys asked audiences to select at most three reasons why they attended the event on either the snapshot census date or the last event attended. The list of options was based both on, broadly, notions of cultural value (for example, Holden 35; Belfiore and Bennett 39;

Behr et al. "Cultural Value and Cultural Policy") and, specifically, a variety of extant surveys on reasons for cultural participation (for example, TNS Scottish Opinion Survey, cited in Creative Scotland 16; ComRes / Arts Council England 15). The survey question has since been adapted based on the responses to an open-ended question in the audience survey: "What do you get out of live music? What would you say are the most important (intangible) things that you take away from live music?"

As mentioned above, the online audience survey invited participants to write about what they value about live music. Hundreds of them responded and were largely very positive about the live music experience as a whole.[13] While analysis of qualitative data in this way is time-consuming, and we recognize that by necessity there are elements of subjectivity, we also believe that this has provided some useful insights into further aspects of live music's social and cultural value. Table 1 contains the main themes, including enhancing social bonding, mood-enhancing, and providing health and well-being benefits.[14]

From the statements about live music's cultural value, then, and as we state in the final report:

> We can see live music's potential to be socially and culturally valuable in a variety of ways, both intrinsically and instrumentally (and frequently, both). Such value may not necessarily be easily quantifiable but, particularly with something like health and well-being, there are clear benefits for its participants and for society more widely. (Webster et al. *Valuing ... Report* 31)

This question about what audiences get out of live music produced a rich dataset that will be of use to future researchers who may wish to interrogate it in more detail than the broad analysis undertaken for the UKLMC project. For example, the open-ended responses in Table 1 offer a rich source of qualitative data that could be used to inform narratives regarding audience perceptions of cultural value, or indeed to guide the formulation of questions for further quantitative work.

Valuing Venues

As well as addressing the social and cultural value of live music, we also wished to bridge the gap between how audiences value the live music experience and the current obstacles the UK's live music sector faces. The bridge we used was a closer examination of the value of the venues in which live music takes place and the challenges that they currently face. Again, our survey-based approach allowed us to capture both quantitative and qualitative data on the value of venues from all four key stakeholders, including the venues themselves.

The importance of the venue to the participant experience was addressed by open-ended questions in both the audience and musician surveys. This asked audiences to name a significant venue which has "been particularly important to [them] as a music fan and say a few words about why that venue has been important," and asked musicians to name a venue which has "been particularly significant to [their] musical career." It was noticeable from the names submitted by survey respondents that venues are valued across the spectrum of venue types, from pubs to small music venues to concert halls. The most striking finding from the musician survey, and to a lesser degree from the audience survey, was the predominance of the Royal Albert Hall. From both the frequency of citations and the descriptions of its symbolic value, it seems that, while perhaps most associated with the classical world, performance and attendance at the

Royal Albert Hall appear to be recognized across genre worlds as being "out-of-the-ordinary" – an object of aspiration. This symbolic value is no doubt aided in part by its distinctive appearance and its extensive use by the BBC for its long-standing annual Proms series.[15] However, historic venues like the Royal Albert Hall were only part of the picture. Highlighting the variety of venues cited by respondents, other notable examples included London's Brixton Academy, Leeds' Brudenell Social Club and Glasgow's Barrowland Ballroom.

Focusing on the *why* part of the question, as with the question on what audiences get out of live music, hundreds of people responded and the open-ended responses were again coded and themed. Individual responses were, of course, varied and covered a wide range of experiences. While, of course, the practical elements of responses from musicians and audience members differed, common themes also emerged. Notably, for both sets of respondents, venues emerged as "sites in which people construct and negotiate meaning" (Webster et al. *Valuing…Report* 45). Friendships, professional development, and "milestones" in respondents' lives were mapped against their live music experiences with venues serving as nodes of aesthetic, narrative, and material value. For instance, one audience member noted the significance of a venue to her own life story: "I had the best times with the best of friends at a time when my home life was in disarray (my dad had a brain tumour). [The venue] represented a release, feeling young again and reassured me I still 'belonged' in the scene" (Audience survey, female, 25-29 years old, North West), (Webster et al. *Valuing…Report* 45).

Musicians and audience members alike noted the value of "atmosphere," and the ways in which the social and professional dimensions of venues were intertwined: "I grew up in Manchester and have seen some of my favourite artists perform there over the last 20 years, starting with Spice Girls aged four. I now work in the live music industry and strongly feel this venue kickstarted my interest in live events" (Audience survey, female, 25-29 years old, London), (Webster et al. *Valuing…Report* 48)

While further examples of individual comments are available in the final report, our point here is that *in aggregate* they also reveal a number of ways in which venues operate as spaces with multiple values beyond their financial contribution to a locale. The themes that emerged from the audience and musician responses have been grouped together to illustrate the different kinds of value, along with how these emerged from the survey responses, and are presented in Table 2.

In the UKLMC respondents were not asked to identify the *type* of venue that they selected and therefore analysis at this level was not possible. Instead we grouped all venue types together, an approach which was justified by the variety of venues and venue types chosen by the respondents. However, part of the goal of the project was also to inform further research – the census process being iterative – and this survey question has since been adapted in the toolkit to include venue type so that future live music censuses may be able to analyze this data at a more granular level: for example, by venue type, locale or genre. Note also that we did not examine the social and cultural value of live music and venues at the level of our snapshot cities although this is perhaps something which, again, could be investigated in future local live music censuses.

Another way of exploring the value of venues (and promoters) was via a question on activities that add cultural value to an area which we included in both the venue and promoter surveys. The list of these "cultural" activities, including "charity work" and "providing volunteering and internship opportunities," was based on qualitative data from a report on small venues by Music Venue Trust (21-25) and then converted into a checkbox question. Our census data showed that a perhaps surprisingly high proportion of venues are involved in (unspecified) charity work (66%) and that well over half (57%) of the venues have informal links with educational communities such as universities and colleges (cf. Webster et al. *Valuing…Report* 33). Other issues covered included volunteering, environmental sustainability, and access for Deaf and disabled people. In this way we were able to highlight and quantify some of the broader ways in which live music and its venues have social and cultural value. Based on these notions of social and cultural value above, then, one of our recommendations to policymakers in our report was that local authority cultural policies should recognize both the economic *and* cultural value of live music and live music venues, and that planning and economic policies should take account of the actual and potential contribution of live music.[16]

Challenges to Live Music Venues

As mentioned above, part of the impetus for the UKLMC project was to better understand the value of live music on the one hand and the challenges facing the sector on the other. Our previous live music census in Edinburgh had illustrated the extent of the difficulties that licensing conditions were causing for venues. (Behr et al. *Edinburgh* 4). Likewise, the Bristol Live Music Census found that 50% of venues said they were affected by development, noise or planning issues (Bucks 7). To understand these issues both locally and nationally, we therefore included a number of survey questions to

gather data around licensing, planning, and associated regulatory matters.
This section will focus on data from the venue surveys.[17]

Our data shows one-third of the nearly 200 venues surveyed across the country reporting that increases in business rates had an extreme, strong, or moderate impact on their events in the previous 12 months. One in three of the small music venues surveyed said they had experienced problems with property developments, which can cause noise complaints from people living nearby. These two findings were the focus of the press release which was sent out in advance of the report launch in February 2018 and formed the focus of the media coverage. Other issues affecting venues included parking/loading issues, diminishing audiences, the cost of paying bands and staff, and licensing issues, and it appears that these are disproportionately affecting small music venues (350 capacity or smaller).

To provide qualitative data, and maximize the range of perspectives on offer, we adopted a mixed methodology that also included interviews and profiles of venue workers, musicians, and other stakeholders. The decision to include profile interviews was based on Behr et al's 2014 work on the cultural value of venues and on Bucks New University/UK Music's Bristol live music census report, which included two venue and four artist "case studies." This combination of "numbers and narratives" had emerged from our preliminary discussions about the project and from focus groups with our industry partners. It was seen as a potentially effective model for engaging policymakers with good news as well as challenges for the sector and was aligned well with the trend emerging from previous reports, including our own (Behr et al. *Cultural Value*) and those of partners (Bucks New University/UK Music). The choice of profile interviewees also allowed us to include regions of the UK, namely Wales and Northern

Ireland, which are facing many of the same issues as England and Scotland, but in which we did not have the resources to conduct an "on the ground" snapshot census.[18]

As the Edinburgh Live Music Census showed, any locality has a characteristic live music "ecology" – a mix of venues of different capacities, demographic variations and the distinctive features of its local government and infrastructure (Behr et al. *Cultural Value* 1). These differences can then impact on the barriers facing venues in each city and the live music ecology more generally. In addition to producing findings at a national level regarding the barriers currently facing the venue sector, then, we also collected data from venues based in the three primary snapshot cities. While the sample sizes for venues were relatively low at city level compared to nationwide, it is nevertheless interesting to note some of the similarities and differences between the three cities. In all three, for example, respondents to the venue survey said that an increasingly competitive environment between venues and promoters was the biggest barrier in that it had an extreme, strong, or moderate impact on their live music events in the previous 12 months.[19] Examples of this include increased saturation of venues looking to attract audiences, promotion companies owning venues, and competition to host smaller acts to curry favor with agents in the hope of attracting larger acts on their rosters.

The data revealed some of the differences between the cities as well. For example, 42% of the respondents to the venue survey in Newcastle-Gateshead said that increased business rates had a negative impact on their live music events in the previous 12 months, compared to only 18% in Oxford, a much more affluent city. As another example, 23% of respondents to the venue survey in Glasgow cited parking/loading issues as having had a negative impact compared to 38% of respondents in Oxford, a highly congested medieval city. Such local nuances have important implications for all the stakeholders, audiences, musicians, promoters, and venues alike.

The timing of the first UK live music census was auspicious in that the topic of the plight of the small venue sector in particular became increasingly more newsworthy throughout the life of the project, not least because of the work of bodies like the Music Venue Trust in maintaining political and media focus. Whilst on the one hand, this meant that it was almost certainly easier to get the attention of media outlets, and hence the public, the timing also had ramifications for the end of the project. At Venues Day in October 2017 it was announced that John Spellar MP would propose his 10 Minute Rule Private Member's Bill to introduce the "Agent of Change" principle into planning law in January 2018. This was excellent news in one sense, both for the small venue sector and for the potential impact of our research, but we were also very aware that our launch date was on February 16, and we were nervous that our results would come too late to the party, as it were. As it happened, the Ministry of Housing, Communities & Local Government announced new legally binding rules to include the "Agent of Change" principle within the Ministry of Housing, Communities & Local Government's National Planning Policy Framework for England on January 18, which necessitated some last-minute but essential amends to our final report. The Scottish Government announced similar measures on the very day of our launch event, leading to one treasured (if slightly disingenuous) headline in the industry publication *Pollstar*: "Scotland to Get Agent of Change in Wake of UK Music Census" (Gottfried).

The adoption of "Agent of Change" was just one of what became 27 recommendations to politicians, the music industries and future researchers in the final report. Since our policy recommendations spanned areas including planning, education and licensing, of necessity we separated them into three levels of government: UK, devolved administration, and local authority. As with calculating the economic value of live music, we were able to use the census to move from a macro (national) level to a more micro (local) level of policy. The next section will reflect more generally on how local contexts both shape the census process and may be informed by it.

Discussion and Constraints

When we applied for funding for the UK census project we knew that relatively limited time and resources meant that we would be unable to directly organize more than three local censuses in the areas where the central research team had physical bases. The original funding application therefore included the potential for additional censuses in other cities which would be organized and managed by members of UK Music's Music Academic Partnership (MAP) which is an invited group of academic institutions affiliated to UK Music. Payment of a fee for MAP membership covers costs for and affords access to various resources such as "student opportunities…rehearsal studies…music industry interface" and a program of events (UK Music, "Music"). Live music censuses took place in our three primary snapshot cities of Glasgow, Newcastle-Gateshead, and Oxford, while affiliate censuses also ran in Brighton, Leeds, and Southampton on March 9-10 and in Liverpool on June 1-2, the affiliates led by members of the MAP. It was interesting to observe the variability in terms of the amount of data collected by each of these affiliate censuses and one can speculate on the reasons behind this variability.

Another one of the challenges of the census was the decision regarding which statistics to present at a national level and which to present more locally, namely how to balance the impact of national statistics against the minutiae of a local census. UK Music's *Wish You Were Here* reports present data nationally, by regions and, in the case of the 2016 report at least, by using an illustrative case study city in each region. However, this was not a directly translatable model for our work, partly because we did not procure sufficient granular data from all regions, particularly Wales and Northern Ireland, with which to make robust statements, but also because we were primarily focused on cities rather than regions. To this end, we decided to take a national focus for some data – for example, on the social and cultural of live music and live music venues – and a local focus for other types of data in the three primary cities. The latter included types/number of venues, local barriers for venues and findings from the snapshot census data including audience travel/transport and median distance travelled, some of which compare the snapshot city's data to national averages.

Decisions about whether to examine topics nationally or locally were sometimes practical – whether the response rate for a particular question was enough to make a "meaningful" analysis[20] – and sometimes epistemological. According to Brenner and Theodore (cited in Boyle et al. 314), neoliberalism has pushed cities to the forefront of the drive for national competitiveness. With this in mind we wanted deliberately to *avoid* the census becoming a competitive exercise. Our goal was for the project to be a useful tool for understanding the different cities' live music ecologies and their challenges, not a means for pitting cities against one another. For example, we could perhaps have examined some of the data around cultural value – such as the percentage of venues engaged in charity work – but avoided this because we wanted to avoid providing ammunition for commentators looking to make lazy comparisons between cities.[21]

The choice of snapshot cities also militated against such comparisons to some degree as Glasgow, Newcastle-Gateshead, and Oxford are geographically distant and demographically different – in terms of population size at least – from each other. Interestingly, out of the three primary snapshot cities, Glasgow is the only one which has been awarded the UNESCO City of Music status, perhaps indicating that Glasgow is internationally regarded as being musically extraordinary, whereas the other two cities have a perhaps more localized reputation for their music scenes. Returning to the concept of "Music Cities," out of all of the snapshot cities, including affiliates, it appears that Leeds and Brighton are the cities most active in embracing the concept. Brighton has already set up a Music Office and Leeds is moving towards using "Music: Leeds" as a brand and concept with which to "umbrella" the various strands of the city's music scene. Beyond the UNESCO accolade, which is conferred externally, the definition of a place as a "Music City" is something which appears to also be bestowed *internally*. While the census project did not seek to define a "Music City" in quantitative terms, further work of this kind could begin to tease out some more quantifiable measures of what makes a "Music City."

Conclusion

This article has presented some of the key findings of the UK Live Music Census of 2017 and looked at how its findings both illustrated the state of the sector and highlighted the implications of this for stakeholders and policymakers. It also considered some of the issues around how a census could relate to the concept of

"Music Cities." Research into the live music sector is still relatively in its infancy and much remains to be done. The first UK live music census illustrated the scale of the task of appraising live music activity across a nation. It also, however, demonstrated the capacity for cooperation across academia and industry. While such partnerships inevitably involve another layer of negotiation and logistical coordination, the publicity and reach of the surveys afforded by working with national bodies were beneficial in the data-gathering process. Likewise, the preliminary focus group consultations were a valuable part of formulating a widely applicable methodology and set of questions.

Based on the findings we have recommended that a regular UK-wide live music census should take place, using the free, open source toolkit published as part of our project.[22] This would enable longitudinal research into the sector. Such longitudinal work is necessary. One challenge, facing academics and industry alike, is that of making sense of a live music sector that is evolving at pace in response to myriad social and political developments (from urban regeneration, through technological change to governmental funding and legislative activities). There is value in snapshots of the state of the sector, especially with regard to informing policymakers. This would be enhanced, though, by the possibility of tracking the *effects* of factors like policy interventions and industry initiatives over time, particularly if they can be mapped onto wider demographic shifts. To this end, the census methodology – and its combination of quantitative and qualitative data – could also offer the opportunity for comparative work on the concerns, priorities and sentiments of musicians, audiences, venue operators and promoters. A consistent way of evaluating the social contexts of longitudinal economic work carries rich potential for theorizing, as well as evaluating, live music.

In addition to a nationwide picture, the toolkit could facilitate regular local live music censuses. For the concept of "Music Cities" to be taken up more widely there needs to be some sense that such places are worth investing in. Furthermore, and as our work showed, the priorities and concerns of venue operators and others vary between cities. This means that granular data about local contexts is needed in addition to the national economic data produced by industry bodies. Monitoring and evaluation by local authorities of efforts to utilize music as an economic driver is essential as a means of understanding how and why music can bring both economic and cultural benefits. A live music census is one way of doing this. A focus on social and cultural value, which goes beyond the purely economic, has much to offer for policymakers and music activists alike in being able to evidence the multifaceted value of live music.

Notes

1. Live Music Exchange is a Knowledge Exchange body that emerged from research into the history of live music in Britain. It was set up in 2012 and, through events and its website, has served as a means of building bridges between academics, policymakers, and industry as well as providing a forum for disseminating live music research beyond the academy.

2. We refer to "music industries" in the plural throughout to incorporate the live, recording, and publishing industries plus ancillaries as a whole while acknowledging their distinctiveness. For more on this see Williamson and Cloonan.

3. By 2017 the Welsh Government and the Mayor of London both pledged to adopt the principle in their planning policies (Welsh Government; Greater London Authority) and in January 2018 the Ministry of Housing, Communities & Local Government announced that it

would add the "Agent of Change" principle to the National Planning Policy Framework for England. It will also be adopted in Scotland (Gottfried).

4. "Business rates" is a tax in England on the occupation of non-domestic (i.e., business) property based on an assessment of the property's value. It derives from an ancient system of property taxes that has been used to fund local services.

5. UK Music defines the music industry (singular) as live music, recorded music, musicians, composers, songwriters, and lyricists, music producers, recording studios and staff, music publishing, and music representatives (*Wish You Were Here 2017* 11).

6. GVA is a measure recommended by the UK government and used in UK Music's reports to indicate the value added to a locale because of the activity in question. In essence, GVA is a metric derived from the amount of goods or services that have been produced, minus the cost of materials or other inputs that have been used in that production.

7. The ratio for seasonal behavior drew on data from the venue online survey of behavior on days of the week (grouped as Sunday-Wednesday, Thursday, Friday, and Saturday) and season (grouped as January – March, April – June, July – September, and October – December). For a full explanation of our methodology see Webster et al. *Valuing … Report* 9-16. For a guide to the calculations we have also provided an interactive spreadsheet in the toolkit on the project website and a step-by-step guide in the toolkit's online appendix at www.uklivemusiccensus.org/#toolkit.

8. While Newcastle-Gateshead is a city region rather than a city *per se*, we use the term "snapshot cities" throughout for clarity.

9. The census asked musicians to define themselves. The categories were “professional (someone who has earned their living substantially from music for a significant proportion of their working life)”; “semi-professional” (someone who is paid as a musician but this is not necessarily how they earn their living); “amateur” (not paid as a musician). This enabled analysis of different “types” of musician.

10. However, comments by survey respondents revealed that the average distance travelled by musicians is highly variable and can also be seasonally affected.

11. Travel cost analysis is a method of valuation that looks beyond market prices to ascribe value based on to travel to a site (or activity). Commonly used to evaluate natural resources and recreational activities, it tracks distance against cost to estimate willingness to pay.

12. Crossick and Kaszynska’s overview of the AHRC Cultural Value Project identified useful methodologies, but did not offer recommendations regarding best to measure cultural value. It is also notable that a recommendation made by academic Dave O’Brien (5) following a placement at what was then known as the Department of Culture, Media and Sport that it should produce a handbook on measuring cultural value has yet to be followed up. (This government department was renamed the Department for Digital, Culture, Media and Sport in 2017 to reflect its shifting responsibility over the course of its activities since it was first formed in 1997.)

13. The online audience survey received 805 qualitative responses.

14. One of the challenges of the project was the decision about the final presentation of the research. We opted to produce two public-facing documents. The first was a full-length report

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(Webster et al. *Valuing…Report*), which, at over 100 pages, was comprehensive but also unwieldy and too expensive to produce in hard copy. It is now on the project website. The second was a 24-page executive summary which covered the key findings and data relating to the recommendations to policymakers, industry practitioners and future researchers. (Webster et al. *Valuing… Executive Summary*).

15. The Proms is an annual series of classical concerts spread over eight weeks in the summer with its origins in nineteenth-century London concert life and which occupies a significant place in British culture.

16. At the suggestion of our partners, UK Music, we added that one way of doing this would be to set up a Music Office and/or Night Mayor/Czar, following the example of cities such as Amsterdam and London (see Henley; Greater London Authority).

17. A key focus of the research was on the smaller end of the venue spectrum as this appeared to be the kind of venue facing the most pressing challenges at the time of the research. It is also worth noting that, overall, over half of all participating census venues were from the smaller end of the sector: 29% of all participating census venues were bars/pubs, 18% were small music venues, and 8% were churches/places of worship.

18. Indeed, it is not just the UK in which smaller venues appear to be suffering. From the United States to Australia and Ireland to Iceland, it appears to be a similar story, albeit not always for the same reasons (Shapiro). As Live DMA, the network for live music venues across Europe posted about the UKLMC on Facebook, "These findings are not only valid for the UK only, but are, as our own experience showed us, also true for other European countries who face the same or similar issues."

19. Glasgow 36%, Newcastle-Gateshead 46%, and Oxford: 43%.

20. For example, of all the cities for which snapshot censuses were conducted (Glasgow, Newcastle-Gateshead, Oxford, Liverpool, Leeds, Brighton, Southampton) the response rates varied greatly. Two of the affiliate censuses collected a notably smaller number of survey data than the rest. Hence we focused on the three primary case-study cities (Glasgow, Newcastle-Gateshead, Oxford) in presenting in-depth examinations.

21. Even so, one journalist wanted us to comment on whether Glasgow was now definitively "better" than Edinburgh for music!

22. This is available at the website for the census report (Webster et al., *Valuing…Report*).

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Table 1. The Social and Cultural Value of Live Music

Live music …	**… because it …**
enhances social bonding	allows people to spend time with friends and family

	helps people make new friends and acquaintances
	offers a sense of belonging
	underpins a shared experience
is mood-enhancing	can provide an emotional connection to the artist, the audience, and the music
	gives pleasure
	is energizing
	is exciting
	is uplifting
	offers entertainment or a good night out
provides health & well-being benefits	allows for relaxation
	offers an opportunity for escapism
offers a unique experience	is different each time, unlike recorded music
	creates distinct and significant memories, both individual and collective
	is where the performer-audience interaction is a fundamental part of the experience

	allows audiences to inhabit the same physical space as the artist, sometimes even to meet them in person
forms a fundamental part of people's identity	becomes part of people's life stories
	can become a regular activity to which people afford great significance
is inspiring	stimulates the discovery of new music and genres
	gives a deeper understanding of the music
	sparks people's own creativity
	gives an opportunity for the appreciation of performers' talents
engages all the senses	allows for outward physical participation (e.g. singing along, moving to the music, applause)
	induces physical sensations caused by features of the live event (e.g. loud volume, lighting effects)
offers potential for transcendence	allows one to 'lose oneself'
	can be a spiritual experience

Table 2. The Social and Cultural Value of Live Music Venues

Live music venues have …	**… because they …**
a role in musical development …	allow for the discovery of new artists/genres
	can be creatively inspiring
	help musicians and others to develop new skills/confidence
narrative value …	have long-term relationships with their users
	become part of people's life stories
	are the sites of memorable experiences
	are places where something significant happened for the first time
	provide regular income/work
social value …	allow people to spend time with friends or family
	can be places for making new friends or acquaintances

	can be sites for developing networks
	have supportive and friendly staff
	can be safe spaces
	have a consistently good atmosphere
symbolic value …	confer status on performers
	have a reputation or history which enhances users' experiences
	can signify moving up the career ladder
	are perceived by users as the best in the UK/world
aesthetic value …	have character or beauty
	have a diverse program
	have a consistently high quality program
	are genre specialists
	program high status or international artists
material value …	allow for proximity to artists
	have a good sound or acoustics

	have good sightlines
	have a good layout
	are local/nearby/easy to get to
	may be the only local venue of its type
	charge or pay a fair price
	allow musicians to put on their own shows